



CPB Certification

Continuing Professional Development (CPD) Policy

Purpose & Scope:

This policy outlines the Continuing Professional Development (CPD) requirements for maintaining the Certified Professional Bookkeeper (CPB) designation.

Holders of the CPB designation are expected to engage in ongoing learning and development that aligns with the core competencies required for bookkeeping professionals. This commitment ensures they remain knowledgeable, relevant, and up-to-date with industry practices and technology.

This policy applies to all CPB holders subject to annual CPD requirements within a calendar year.

Policy Parameters:

CPD Cycle:

- Duration – January 1st - December 31st (pro-rated for partial year, if required).
- The minimum required CPDs are no less than twenty (20) CPDs throughout the year.
- The annual reset begins each January 1st.

Compliance:

Each year, all Certified members are required to submit a mandatory annual attestation to CPB Canada by December 31st. This attestation confirms that they have met the annual Continuing Professional Development (CPD) requirements. It is important to note that this process is separate from membership renewal and is specifically for members holding the CPB designation.

If a member fails to submit their attestation, it will be recorded as incomplete in their records. Repeated instances of non-compliance may affect the member's



designation status. However, the goal is to encourage a high standard of voluntary compliance.

Verification:

CPB Canada will provide tools for self-attestation on an annual basis. This attestation serves as the official confirmation of a member's compliance with annual Continuing Professional Development (CPD) requirements. If a member fails to complete the attestation, their CPD will be marked as incomplete and considered non-compliant for that year.

In addition to the self-attestation process, CPB Canada will conduct random audits of annual CPD compliance during the first quarter of each year. Between 3% and 5% of CPB holders will be randomly selected and may be required to provide evidence of their CPD activities from the previous year.

Through this annual audit process, CPB Canada aims to uphold the integrity of the CPB designation and ensure adherence to ongoing learning requirements.

Tracking and Record Keeping

Members are solely responsible for tracking their annual Continuing Professional Development (CPD) activities and retaining all proof of registration, attendance and completion.

Non-Compliance:

Members found to be non-compliant must seek to rectify their situation within ninety (90) days of notification. During these ninety days, members should:

- Ensure outstanding CPD requirements for the relevant period are fulfilled.
- Retain necessary evidence for audit verification (if required).
- Failure to rectify non-compliance may result in sanctions or potential revocation of their designation and digital credential.

CPB Canada staff will handle all matters related to non-compliance. If required, staff may engage the Certification Advisory Group for further support/clarification.



Appendix A – Definitions & Terms

What Is Considered CPD?

Members should plan and choose Continuing Professional Development (CPD), which is diverse and includes both business and technical skills in accounting, as well as enabling competencies such as leadership, professionalism, and communication. Additionally, CPD should cover aspects of professional conduct and ethical behaviour. All CPD activities should:

- Be relevant to your professional responsibilities and competencies.
- Be quantifiable; it must be expressed in terms of a specific time requirement.
- Contain significant intellectual or practical content.
- Be delivered by credible entities such as CPB Canada, CPA Canada, National Payroll Institute, colleges, universities, government agencies, independent and reputable trainers, accounting technology providers, etc.

What Is NOT Considered CPD?

Networking events, such as social functions, breakfasts, lunches, and dinners, typically do not qualify for Continuing Professional Development (CPD) credit unless it can be clearly demonstrated that relevant professional learning activities took place during these events.

Additionally, while attending industry trade shows can be beneficial, such attendance does not meet the definition of continuing professional development as outlined in this policy.

CPD Breakdown:

A breakdown of a minimum of twenty (20) hours of required CPD should include:

- Minimum two (2) hours of ethics or professional conduct-related training.
- Broad suite of technical and business-related competencies
- Other development (i.e. speaking, community involvement, self-directed CPD etc.).



Verifiable CPD Hours:

Continuing Professional Development (CPD) activities can be pursued through various professional development options or educational courses. These may include conferences, seminars, symposiums, webinars, workshops, and attending presentations. To document verifiable hours, you can provide one of the following types of evidence as applicable:

- A copy of a course payment receipt or invoice
- A certificate of completion or official transcript
- Confirmation of participation from a provider or employer
- An attendance record (e.g., a sign-in sheet)
- Course or exam results, or a confirmation of designation or certification
- A letter on official letterhead, signed by someone in a position of authority within the organization, detailing hours worked and duties performed
- Proof of the position held within an organization (e.g., a copy of a public listing of board directors)

Self-directed CPD Activities:

Other options for Continuing Professional Development (CPD) include self-directed activities that may not be easily verifiable. These activities can encompass various forms such as reading, listening to podcasts, and watching videos. It is important to note that while self-directed CPD is acknowledged, it can only account for a maximum of 10% of the total annual CPD claimed.

CPD Exemptions:

Members unable to fulfill their CPD requirements can request an exemption due to particular circumstances, including:

- A severe medical diagnosis of self or that of an immediate family member
- Maternity, paternity, parental, or family care
- Unemployment/seeking employment



Members whose ability to earn a livelihood has been significantly disrupted or impaired, not meeting the criteria above and/or considering the context of the CPB Canada Hardship Policy, can seek an exemption in writing to be determined by staff at CPB Canada.